

# HEALTH SAVINGS ACCOUNT (HSA)

## Ready – Set – Upgrade!

BenefitWallet® is upgrading your HSA! This handy guide provides full details about the coming upgrade including important dates, actions you need to take, frequently asked questions and additional resources.

### IMPORTANT DATES

Please review these important dates for the HSA upgrade; your required actions are shown below.

<b>June 29</b>	New member portal launches & new mobile app available for download
<b>July 14</b>	All new HSA debit cards have been mailed
<b>July 16-17</b>	HSA debit cards (current and new) not available; use your BenefitWallet checkbook or the member portal to make payments during this two-day period
<b>July 18</b>	New HSA debit cards are ready to use

### YOUR ACTION REQUIRED

Click any of the items below to learn more about your required actions for the upcoming HSA upgrade.

#### MEMBER PORTAL

- [By June 28, download any saved documentation from the current member portal, if needed](#)
- [After June 29, reset any recurring payments to health care providers/payees, if needed](#)
- [After June 29, reset your direct deposit information, if needed](#)
- [After June 29, reset any recurring post-tax HSA contributions \(i.e., HSA contributions outside of your pre-tax payroll deductions\), if needed](#)

#### DEBIT CARD

- [By June 20, make sure BenefitWallet has your current mailing address so your new debit card isn't delayed](#)
- [Upon receipt, activate your new debit card and set up your PIN](#)
- [If needed, order additional debit card\(s\) for your dependents](#)

#### MOBILE APP

- [June 29, download the new BenefitWallet app; search for \*\*BenefitWallet+\*\*](#)

### FREQUENTLY ASKED QUESTIONS (FAQS)

[Member Portal FAQs](#)

[Debit Card FAQs](#)

[Mobile App FAQs](#)

# HEALTH SAVINGS ACCOUNT (HSA)

## Member Portal: Step-by-Step

### HOW TO: Download Saved Documentation

If you have documentation or scanned receipts saved on the current BenefitWallet member portal, you will need to download that documentation before the new BenefitWallet member portal launches. These documents will not transfer to the new member portal.

1. **Before** the new member portal launches, log in to your account on the [current member portal](#) or through your health plan website
2. Select *Payments & Reimbursements* from the main menu
3. Depending on where your documents are saved, select one or more of the following options from the dropdown menu:
  - ✓ *Created Claims*
  - ✓ *My Payment Card Transactions*
  - ✓ *HSA Save-It!*
4. Click and open your document to download
5. If you have a document that is 'archived,' please request your download and check back; the process of retrieving an archived document may take up to 24 hours

### HOW TO: Reset Recurring Payments to Health Care Providers/Payees

If you currently make recurring payments to a health care provider (payee) through the BenefitWallet member portal, you will need to reset these on the new member portal.

1. **After** the [new member portal](#) launches, log in to your account through [mybenefitwallet.com](https://mybenefitwallet.com) or your health plan website
2. Select *Pay A Provider* from the menu on the home page
3. Select *Add New Profile* and complete the required fields to create a new provider profile
4. Click *Next* and complete the payment information; indicate if the payment is *one-time* or *recurring*
5. Click *Next* to verify your provider and payment information is correct
6. Click *Submit*; your provider information will be saved after you submit your payment

### HOW TO: Reset Your Direct Deposits

If you are currently using direct deposit for reimbursements to a non-HSA checking or savings account, you will need to reset this information in the new member portal.

1. **After** the new member portal launches, log in to your account through [mybenefitwallet.com](https://mybenefitwallet.com) or your health plan website
2. Select *Direct Deposit Information* from the menu on the home page
3. Enter the required information
4. Click *Verify* to submit your information

### HOW TO: Reset Recurring Post-Tax HSA Contributions

If you currently have recurring post-tax HSA contributions, meaning those outside of the regular pre-tax payroll contributions made through your employer, you will need to reset them in the new member portal.

1. **After** the new member portal launches, log in to your account through [mybenefitwallet.com](https://mybenefitwallet.com) or your health plan website
2. Select *Make an HSA Contribution* from the menu on the home page
3. Complete the online form to reset the recurring contribution

# HEALTH SAVINGS ACCOUNT (HSA)

## Member Portal: Frequently Asked Questions (FAQs)

### What is changing on the BenefitWallet member portal?

BenefitWallet is introducing an upgraded member portal featuring a new look and enhanced navigation to make it easier for you to manage your account.

### Will the member portal web address (URL) change?

No. The web address (URL) for the member portal is not changing and will remain [mybenefitwallet.com](https://mybenefitwallet.com).

### Will I need to change my User ID and password for the member portal?

No. Your current User ID and password remain the same.

### Will I need a security code to sign onto the new member portal?

It is possible you will need to enter a security code when first signing in to the new member portal. If so, the security code will be sent to your email address on file. You can also call the Service Center at 877.472.4200.

### I typically log in to the BenefitWallet member portal directly from my health plan's site. Do I need to do anything different to access my account after the new portal launches?

No. Your process to log in to the new member portal will remain unchanged.

### I have security questions and a PIN on file for the current member portal. Do I need to reset them?

No. Your security questions and PIN as stored in your profile remain in effect.

### What is happening to the documents I have saved on the current member portal?

Any receipts, claims or other documents that you saved on the existing member portal need to be downloaded before the new member portal launches. These documents will not be transferred to the new portal, so if you do not download them, you are at risk of losing them.

### How do I download these documents?

1. **Before** the new member portal launches, log in to your account on the [current member portal](#) or through your health plan website
2. Select *Payments & Reimbursements* from the main menu on the home page
3. Depending on where your documents are saved, select one or more of the following options from the dropdown menu:
  - ✓ *Created Claims*
  - ✓ *My Payment Card Transactions*
  - ✓ *HSA Save-It!*
4. Click and open your document to download
5. If you have a document that is 'archived,' please request your download and check back; the process of retrieving an archived document may take up to 24 hours

### What should I do with the documents I download from the current member portal?

Please save these documents to a personal storage device, preferably one that is backed up on a regular basis. The new member portal is set up for you to save your new documentation going forward, but is not available for saving historical documentation of paid claims.

# HEALTH SAVINGS ACCOUNT (HSA)

## Member Portal: FAQs (continued)

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### What happens if I don't download my saved documents?

These documents will not be transferred to the new member portal, so if you do not download them, you are at risk of losing them.

### Will my existing settings for recurring payments to health care providers, direct deposits, and recurring post-tax contributions transfer to the new member portal?

No. These settings will not transfer; you will need to reset them **after** the new member portal launches.

### I currently make recurring payments through the member portal to my son's orthodontist. Will I have to reset this information on the new member portal?

Yes, you will have to reset this information **after** the new member portal launches.

1. Log in to your account on the [new member portal](#) or through your health plan website
2. Select *Pay A Provider* from the menu on the home page
3. Select *Add New Profile* and complete the required fields to create a new provider profile
4. Click *Next* and complete the payment information; indicate if the payment is *one-time* or *recurring*
5. Click *Next* to verify your provider and payment information is correct
6. Click *Submit*; your provider information will be saved after you submit your payment

### I currently use direct deposit for reimbursements to a non-HSA checking or savings account. Will I have to reset this information on the new member portal?

Yes, you will have to reset this information **after** the new member portal launches.

1. Log in to your account on the [new member portal](#) or through your health plan website
2. Select *Direct Deposit Information* from the menu on the home page
3. Enter the required information
4. Click *Verify* to submit your information

### I currently make recurring post-tax contributions to my HSA. Will I have to reset this information on the new member portal?

Yes, you will have to reset this information **after** the new member portal launches.

1. Log in to your account on the [new member portal](#) or through your health plan website
2. Select *Make an HSA Contribution* from the menu on the home page
3. Complete the online form to reset the recurring contribution

### Are my investment selections and settings impacted by this change?

No. Investment selections and recurring investments are unchanged as a result of the new member portal. Recurring redemption transactions also remain in effect.

### I have a Power of Attorney or Alternate Contact on file on the current member portal. Do I need to update either in the new member portal?

No. Any Power of Attorney or Alternate Contact information remains unchanged. However, it is a good practice to periodically review this information and make updates as applicable.

# HEALTH SAVINGS ACCOUNT (HSA)

## Debit Card: Step-by-Step

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### HOW TO: Update Your Current Mailing Address for New Debit Card Mailing

To ensure you receive your new debit card without delay, please take a few moments to update your current mailing address:

1. Log in to your BenefitWallet account at [mybenefitwallet.com](https://mybenefitwallet.com); if you are not registered, click *First Time User* and follow the on-screen prompts
2. Click *My Profile* to update your mailing information

### HOW TO: Activate Your New Debit Card and Set Up PIN

You should activate your new debit card upon receipt:

1. Call the phone number that's on the sticker located on the front of the card or call 888.999.0553
2. Follow the automated prompts to activate your card
3. Remain on the line to create your Personal Identification Number (PIN) for your new debit card; a PIN is required to use an ATM

### HOW TO: Order Additional Debit Cards for Dependents

As the account holder, you can order additional cards for your dependents. Order your card online using the steps below or contact our Service Center at the number on the back of your card or 877.472.4200.

1. Log in to your account at [mybenefitwallet.com](https://mybenefitwallet.com) or through your health plan website
2. Click *My Debit Cards* from the *My Money* menu
3. Enter your dependent's name for the additional debit card
4. After verifying your current mailing address, click *Submit*

# HEALTH SAVINGS ACCOUNT (HSA)

## Debit Card: Frequently Asked Questions (FAQs)

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### Why am I receiving a new Health Savings Account (HSA) debit card?

BenefitWallet is providing chip-enabled debit cards to our members for greater security. With encryption built in to the chip, these cards are specifically designed to prevent fraud.

### When will I receive my new debit card?

The debit cards will mail over a 10-day period of July 3 – July 14. Your card will arrive depending on the date it was mailed; [click here](#) for more information.

### How do I identify my new debit card?

The new debit card is dark blue with the words “Health Savings Account” printed next to the chip on the front of the card.

### How do I activate my new debit card?

Call the phone number that’s on the sticker on the front of your new debit card or 888.999.0553.

### Do I need to create a Personal Identification Number (PIN) for my debit card?

Yes. When using an ATM, a PIN is required. In addition, some providers and merchants may require one at the point of sale. Please make sure you create your PIN during activation.

### When can I start using my new debit card?

Following activation, you can begin using your new debit card once your HSA balance has been transferred from your old debit card; this will occur over a [two-day period](#). Once the balance transfer is complete, you can begin using your new debit card.

### Is there a period of time when neither of my cards (current and new) will work?

Yes. There will be a two-day period when neither card may be used because your HSA balance is being transferred from the current debit card to the new debit card; [click here](#) to review the timing. During this time, use your BenefitWallet checkbook or the [member portal](#) to make payments.

### How many new debit cards will I receive?

You will receive one new debit card.

### Whose name will be printed on the new card?

The new debit card will feature the account holder’s name.

### Can I request an additional debit card for myself?

Yes. For self-service convenience, order your card online using the steps below. Or, you can contact our Service Center at the number on the back of your card or at 877.472.4200.

1. Log in to your account at [mybenefitwallet.com](http://mybenefitwallet.com) or through your health plan website
2. Click *My Debit Cards* from the *My Money* menu
3. After verifying your current mailing address, click *Submit*

# HEALTH SAVINGS ACCOUNT (HSA)

## Debit Card: FAQs (continued)

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### Can I request an additional debit card in a spouse or dependent's name?

Yes, as the account holder, you can request additional cards in the names of your spouse or dependents. For self-service convenience, order your card online using the steps below. Or, you can contact our Service Center at the number on the back of your card or at 877.472.4200.

1. Log in to your account at [mybenefitwallet.com](https://mybenefitwallet.com) or through your health plan website
2. Click *My Debit Cards* from the *My Money* menu
3. Enter your dependent's name for the additional debit card
4. After verifying your current mailing address, click *Submit*

### Will there be a charge for additional debit cards?

For a short period after your new debit card is issued, there will be no charge for additional debit cards. After that, there will be a charge for additional cards according to the fee schedule for your account. Log in to the [member portal](#) to view the information specific to your account.

### Will my debit card have a new account number?

Yes. Each new debit card has a unique number. If you request additional cards for your dependents, each card will have a unique number.

### What should I do with my old debit card?

Although your old card will be deactivated shortly after your new card is issued, we recommend that you destroy and discard your old debit card for security purposes.

### What if I never received my new debit card?

If you have not received your new debit card within two weeks of the mailing date, order your card online using the steps below. Or, contact our Service Center at 877.472.4200.

1. Log in to your account at [mybenefitwallet.com](https://mybenefitwallet.com) or through your health plan website
2. Click *My Debit Cards* from the *My Money* menu
3. After verifying your current mailing address, click *Submit*

### Can I access an ATM with my new debit card?

Yes. If you currently have ATM access, you will continue to have it with your new card. Please note you will need a PIN to access your account through an ATM and the daily maximum for withdrawal is \$500 including any associated fees.

### I set up my existing debit card to make recurring payments for orthodontia (or another recurring eligible expense). Will I have to reset my debit card information once I have my new card?

Yes. Please [click here](#) for step-by-step instructions.

### I also have a Health Care Flexible Spending Account (FSA) with BenefitWallet. Will I get a separate card?

Yes. Separate cards will be issued for your BenefitWallet accounts. This gives you greater control over your spending. The cards are different colors; the HSA card is blue while the FSA card is silver. Note: The BenefitWallet Dependent Care FSA does not have a debit card, so if you currently have this account, you will not receive a debit card.

## HEALTH SAVINGS ACCOUNT (HSA)

### Debit Card: FAQs (continued)

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**I also have a Health Reimbursement Arrangement (HRA) with BenefitWallet. Will I get a separate card?**

Yes. Separate cards will be issued for your BenefitWallet accounts. This gives you greater control over your spending. The cards are different colors; the HSA card is blue while the HRA card is silver.

**What if I don't want a new debit card?**

The new chip-enabled card offers greater security for your health care transactions. In addition, your current card will no longer work after the new cards are issued.

**What if I am planning to close my account? Do I still need a new debit card?**

As long as your account is in active status, you will receive a new debit card. Once your termination is processed, your debit card will be cancelled.

**What do I do if my debit card is lost or stolen?**

To report your card lost or stolen, please contact the Service Center at 877.472.4200 as soon as possible.



# HEALTH SAVINGS ACCOUNT (HSA)

## Mobile App: Step-by-Step

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### HOW TO: Download the New Mobile App

The new BenefitWallet mobile app is available for iOS (Apple) and Android formats so you need to download it from the appropriate app store.

1. Depending on your mobile device, access the App Store® or Google Play™ store\*
2. Search for **BenefitWallet+**
3. Follow the prompts to download and install the new app
4. To log in, use the same User ID and password that you use for the BenefitWallet member portal; if you are not registered for the member portal, visit [mybenefitwallet.com](https://mybenefitwallet.com) and complete the *First Time User* process
5. Although not required, you may want to uninstall the old BenefitWallet app from your device

## Mobile App: Frequently Asked Questions (FAQs)

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### How will the BenefitWallet changes affect the mobile app?

We are upgrading the mobile app to a new app called **BenefitWallet+**. The new app will have Touch ID, allowing you to sign in with your fingerprint. It will also include more self-service features plus user-friendly graphics to help you track your HSA contributions and spending.

### Will there be a period of time when the BenefitWallet mobile app is unavailable?

Beginning June 8 the current BenefitWallet mobile app will no longer update with real-time information and will not be available for transactions. The new app will be available by June 29, pending posting to the app stores. While the app is unavailable you can access account balances, transaction history, and other account information by accessing the BenefitWallet [member portal](#) or calling the Service Center at 877.472.4200.

### When can I download the new mobile app?

The new app will be available by June 29, pending posting to the app stores. Visit the App Store® for iOS devices or Google Play™ for Android.\* Search for **BenefitWallet+** and follow the prompts to install.

### How do I sign in to the new mobile app?

You will use the same User ID and password that you use for the current version of the app. Because the User ID and password for the mobile app are the same as the BenefitWallet [member portal](#), you will need to register your account on the portal before attempting to log in to the app. If you are not a registered user for the BenefitWallet member portal, visit [mybenefitwallet.com](https://mybenefitwallet.com) and complete the *First Time User* process.

### Do I need to delete the old app from my phone? If so, when?

Since the old app will no longer update in real-time and not be available for transactions, you may want to uninstall the old BenefitWallet app from your mobile device after June 8.

\*App Store is a service mark of Apple Incorporated. Google Play is a trademark of Google, Inc.